

The Honorable Barbara J. Rothstein

UNITED STATES DISTRICT COURT

FOR THE WESTERN DISTRICT OF WASHINGTON

MICAELA GRILL, individually and as  
personal representative of THE ESTATE OF  
DONALD C. MARTIN,

Plaintiff,

v.

ALLSTATE INSURANCE COMPANY,

Defendant.

Case No. 2:23-cv-01058

**STIPULATED PROTECTIVE ORDER**

**1. PURPOSES AND LIMITATIONS**

Discovery in this action is likely to involve production of confidential, proprietary, or private information for which special protection may be warranted. Accordingly, the parties hereby stipulate to and petition the court to enter the following Stipulated Protective Order. The parties acknowledge that this agreement is consistent with LCR 26(c). It does not confer blanket protection on all disclosures or responses to discovery, the protection it affords from public disclosure and use extends only to the limited information or items that are entitled to confidential treatment under the applicable legal principles, and it does not presumptively entitle parties to file confidential information under seal.

1     **2.     “CONFIDENTIAL” MATERIAL**

2             “Confidential” material shall include the following documents and tangible things  
3 produced or otherwise exchanged:

- 4             a)     Allstate’s Property Claim Handling Manual;  
5             b)     Allstate’s Claim Operations Manual; and  
6             c)     Allstate’s underwriting file.

7     **3.     SCOPE**

8             The protections conferred by this agreement cover not only confidential material (as  
9 defined above), but also (1) any information copied or extracted from confidential material; (2)  
10 all copies, excerpts, summaries, or compilations of confidential material; and (3) any  
11 testimony, conversations, or presentations by parties or their counsel that might reveal  
12 confidential material.

13             However, the protections conferred by this agreement do not cover information that is  
14 in the public domain or becomes part of the public domain through trial or otherwise.

15     **4.     ACCESS TO AND USE OF CONFIDENTIAL MATERIAL**

16             4.1     Basic Principles. A receiving party may use confidential material that is  
17 disclosed or produced by another party or by a non-party in connection with this case only for  
18 prosecuting, defending, or attempting to settle this litigation. Confidential material may be  
19 disclosed only to the categories of persons and under the conditions described in this  
20 agreement. Confidential material must be stored and maintained by a receiving party at a  
21 location and in a secure manner that ensures that access is limited to the persons authorized  
22 under this agreement.

23             4.2     Disclosure of “CONFIDENTIAL” Information or Items. Unless otherwise  
24 ordered by the court or permitted in writing by the designating party, a receiving party may  
25 disclose any confidential material only to:  
26

1 (a) the receiving party's counsel of record in this action, as well as  
 2 employees of counsel to whom it is reasonably necessary to disclose the information for this  
 3 litigation;

4 (b) the officers, directors, and employees (including in house counsel) of the  
 5 receiving party to whom disclosure is reasonably necessary for this litigation, unless the parties  
 6 agree that a particular document or material produced is for Attorney's Eyes Only and is so  
 7 designated;

8 (c) experts and consultants to whom disclosure is reasonably necessary for  
 9 this litigation and who have signed the "Acknowledgment and Agreement to Be Bound"  
 10 (Exhibit A);

11 (d) the court, court personnel, and court reporters and their staff;

12 (e) copy or imaging services retained by counsel to assist in the duplication  
 13 of confidential material, provided that counsel for the party retaining the copy or imaging  
 14 service instructs the service not to disclose any confidential material to third parties and to  
 15 immediately return all originals and copies of any confidential material;

16 (f) during their depositions, witnesses in the action to whom disclosure is  
 17 reasonably necessary and who have signed the "Acknowledgment and Agreement to Be  
 18 Bound" (Exhibit A), unless otherwise agreed by the designating party or ordered by the court.  
 19 Pages of transcribed deposition testimony or exhibits to depositions that reveal confidential  
 20 material must be separately bound by the court reporter and may not be disclosed to anyone  
 21 except as permitted under this agreement;

22 (g) the author or recipient of a document containing the information or a  
 23 custodian or other person who otherwise possessed or knew the information.

24 4.3 Filing Confidential Material. Before filing confidential material or discussing or  
 25 referencing such material in court filings, the filing party shall confer with the designating  
 26 party, in accordance with Local Civil Rule 5(g)(3)(A), to determine whether the designating

1 party will remove the confidential designation, whether the document can be redacted, or  
 2 whether a motion to seal or stipulation and proposed order is warranted. During the meet and  
 3 confer process, the designating party must identify the basis for sealing the specific confidential  
 4 information at issue, and the filing party shall include this basis in its motion to seal, along with  
 5 any objection to sealing the information at issue. Local Civil Rule 5(g) sets forth the  
 6 procedures that must be followed and the standards that will be applied when a party seeks  
 7 permission from the court to file material under seal. A party who seeks to maintain the  
 8 confidentiality of its information must satisfy the requirements of Local Civil Rule 5(g)(3)(B),  
 9 even if it is not the party filing the motion to seal. Failure to satisfy this requirement will result  
 10 in the motion to seal being denied, in accordance with the strong presumption of public access  
 11 to the Court's files.

## 12 **5. DESIGNATING PROTECTED MATERIAL**

13 5.1 Exercise of Restraint and Care in Designating Material for Protection. Each  
 14 party or non-party that designates information or items for protection under this agreement  
 15 must take care to limit any such designation to specific material that qualifies under the  
 16 appropriate standards. The designating party must designate for protection only those parts of  
 17 material, documents, items, or oral or written communications that qualify, so that other  
 18 portions of the material, documents, items, or communications for which protection is not  
 19 warranted are not swept unjustifiably within the ambit of this agreement.

20 Mass, indiscriminate, or routinized designations are prohibited. Designations that are  
 21 shown to be clearly unjustified or that have been made for an improper purpose (*e.g.*, to  
 22 unnecessarily encumber or delay the case development process or to impose unnecessary  
 23 expenses and burdens on other parties) expose the designating party to sanctions.

24 If it comes to a designating party's attention that information or items that it designated  
 25 for protection do not qualify for protection, the designating party must promptly notify all other  
 26 parties that it is withdrawing the mistaken designation.

1           5.2   Manner and Timing of Designations. Except as otherwise provided in this  
 2 agreement (see, *e.g.*, second paragraph of section 5.2(a) below), or as otherwise stipulated or  
 3 ordered, disclosure or discovery material that qualifies for protection under this agreement  
 4 must be clearly so designated before or when the material is disclosed or produced.

5           (a)   Information in documentary form: (*e.g.*, paper or electronic documents  
 6 and deposition exhibits, but excluding transcripts of depositions or other pretrial or trial  
 7 proceedings), the designating party must affix the word “CONFIDENTIAL” to each page that  
 8 contains confidential material. If only a portion or portions of the material on a page qualifies  
 9 for protection, the producing party also must clearly identify the protected portion(s) (*e.g.*, by  
 10 making appropriate markings in the margins).

11           (b)   Testimony given in deposition or in other pretrial proceedings: the  
 12 parties and any participating non-parties must identify on the record, during the deposition or  
 13 other pretrial proceeding, all protected testimony, without prejudice to their right to so  
 14 designate other testimony after reviewing the transcript. Any party or non-party may, within  
 15 fifteen days after receiving the transcript of the deposition or other pretrial proceeding,  
 16 designate portions of the transcript, or exhibits thereto, as confidential. If a party or non-party  
 17 desires to protect confidential information at trial, the issue should be addressed during the pre-  
 18 trial conference.

19           (c)   Other tangible items: the producing party must affix in a prominent  
 20 place on the exterior of the container or containers in which the information or item is stored  
 21 the word “CONFIDENTIAL.” If only a portion or portions of the information or item warrant  
 22 protection, the producing party, to the extent practicable, shall identify the protected portion(s).

23           5.3   Inadvertent Failures to Designate. If timely corrected, an inadvertent failure to  
 24 designate qualified information or items does not, standing alone, waive the designating party’s  
 25 right to secure protection under this agreement for such material. Upon timely correction of a  
 26

1 designation, the receiving party must make reasonable efforts to ensure that the material is  
2 treated in accordance with the provisions of this agreement.

3 **6. CHALLENGING CONFIDENTIALITY DESIGNATIONS**

4 6.1 Timing of Challenges. Any party or non-party may challenge a designation of  
5 confidentiality at any time. Unless a prompt challenge to a designating party's confidentiality  
6 designation is necessary to avoid foreseeable, substantial unfairness, unnecessary economic  
7 burdens, or a significant disruption or delay of the litigation, a party does not waive its right to  
8 challenge a confidentiality designation by electing not to mount a challenge promptly after the  
9 original designation is disclosed.

10 6.2 Meet and Confer. The parties must make every attempt to resolve any dispute  
11 regarding confidential designations without court involvement. Any motion regarding  
12 confidential designations or for a protective order must include a certification, in the motion or  
13 in a declaration or affidavit, that the movant has engaged in a good faith meet and confer  
14 conference with other affected parties in an effort to resolve the dispute without court action.  
15 The certification must list the date, manner, and participants to the conference. A good faith  
16 effort to confer requires a face-to-face meeting or a telephone conference.

17 6.3 Judicial Intervention. If the parties cannot resolve a challenge without court  
18 intervention, the designating party may file and serve a motion to retain confidentiality under  
19 Local Civil Rule 7 (and in compliance with Local Civil Rule 5(g), if applicable). The burden  
20 of persuasion in any such motion shall be on the designating party. Frivolous challenges, and  
21 those made for an improper purpose (*e.g.*, to harass or impose unnecessary expenses and  
22 burdens on other parties) may expose the challenging party to sanctions. All parties shall  
23 continue to maintain the material in question as confidential until the court rules on the  
24 challenge.

1     **7. PROTECTED MATERIAL SUBPOENAED OR ORDERED PRODUCED IN**  
 2     **OTHER LITIGATION**

3     If a party is served with a subpoena or a court order issued in other litigation that  
 4     compels disclosure of any information or items designated in this action as  
 5     “CONFIDENTIAL,” that party must:

6             (a)     promptly notify the designating party in writing and include a copy of  
 7     the subpoena or court order;

8             (b)     promptly notify in writing the party who caused the subpoena or order to  
 9     issue in the other litigation that some or all of the material covered by the subpoena or order is  
 10    subject to this agreement. Such notification shall include a copy of this agreement; and

11            (c)     cooperate with respect to all reasonable procedures sought to be pursued  
 12    by the designating party whose confidential material may be affected.

13    **8. UNAUTHORIZED DISCLOSURE OF PROTECTED MATERIAL**

14    If a receiving party learns that, by inadvertence or otherwise, it has disclosed  
 15    confidential material to any person or in any circumstance not authorized under this agreement,  
 16    the receiving party must immediately (a) notify in writing the designating party of the  
 17    unauthorized disclosures, (b) use its best efforts to retrieve all unauthorized copies of the  
 18    protected material, (c) inform the person or persons to whom unauthorized disclosures were  
 19    made of all the terms of this agreement, and (d) request that such person or persons execute the  
 20    “Acknowledgment and Agreement to Be Bound” that is attached hereto as Exhibit A.

21    **9. INADVERTENT PRODUCTION OF PRIVILEGED OR OTHERWISE**  
 22    **PROTECTED MATERIAL**

23    When a producing party gives notice to receiving parties that certain inadvertently  
 24    produced material is subject to a claim of privilege or other protection, the obligations of the  
 25    receiving parties are those set forth in Federal Rule of Civil Procedure 26(b)(5)(B). This  
 26    provision is not intended to modify whatever procedure may be established in an e-discovery

order or agreement that provides for production without prior privilege review. The parties agree to the entry of a non-waiver order under Fed. R. Evid. 502(d) as set forth herein.

**10. NON TERMINATION AND RETURN OF DOCUMENTS**

Within 60 days after the termination of this action, including all appeals, each receiving party must return all confidential material to the producing party, including all copies, extracts and summaries thereof. Alternatively, the parties may agree upon appropriate methods of destruction.

Notwithstanding this provision, counsel are entitled to retain one archival copy of all documents filed with the court, trial, deposition, and hearing transcripts, correspondence, deposition and trial exhibits, expert reports, attorney work product, and consultant and expert work product, even if such materials contain confidential material.

The confidentiality obligations imposed by this agreement shall remain in effect until a designating party agrees otherwise in writing or a court orders otherwise.

IT IS SO STIPULATED, THROUGH COUNSEL OF RECORD.

DATED this 16<sup>th</sup> day of April, 2024.

FOX ROTHSCHILD LLP

s/ Al Roundtree

Wendy E. Lyon, WSBA #34461

Bryan J. Case, WSBA #41781

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*Attorneys for Defendant Allstate Insurance Company*

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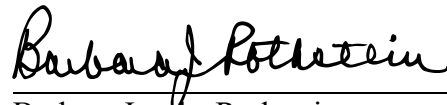
*Attorneys for Plaintiffs*



PURSUANT TO STIPULATION, IT IS SO ORDERED

IT IS FURTHER ORDERED that pursuant to Fed. R. Evid. 502(d), the production of any documents in this proceeding shall not, for the purposes of this proceeding or any other federal or state proceeding, constitute a waiver by the producing party of any privilege applicable to those documents, including the attorney-client privilege, attorney work-product protection, or any other privilege or protection recognized by law.

DATED this 19th day of April, 2024.

  
Barbara Jacobs Rothstein  
U.S. District Court Judge

**EXHIBIT A**

**ACKNOWLEDGMENT AND AGREEMENT TO BE BOUND**

I, \_\_\_\_\_ [print or type full name], of  
 \_\_\_\_\_ [print or type full address],  
 declare under penalty of perjury that I have read in its entirety and understand the foregoing  
 Stipulated Protective Order that was issued by the United States District Court for the Western  
 District of Washington on \_\_\_\_\_ [date] in the case of *Micaela Grill, et al v.*  
*Allstate Insurance Company*, Case No. 2:23-CV-01058, I agree to comply with and to be  
 bound by all the terms of this Stipulated Protective Order and I understand and acknowledge  
 that failure to so comply could expose me to sanctions and punishment in the nature of  
 contempt. I solemnly promise that I will not disclose in any manner any information or item  
 that is subject to this Stipulated Protective Order to any person or entity except in strict  
 compliance with the provisions of this Order.

I further agree to submit to the jurisdiction of the United States District Court for the  
 Western District of Washington for the purpose of enforcing the terms of this Stipulated  
 Protective Order, even if such enforcement proceedings occur after termination of this action.

Date: \_\_\_\_\_

City and State where sworn and signed: \_\_\_\_\_

Printed name: \_\_\_\_\_

Signature: \_\_\_\_\_